Chapter 3

Managing Enrollments, Cancellations, and Attendance

Chapter Overview

Introduction This chapter explains the process of managing enrollments, cancellations, and attendance in OTA.

Chapter Contents

See Also Module 7, Employee Training and Development

Overview

Section: Querying OTA Windows

Chapter 1, Completing the Training Request Form

Chapter 2, Defining an Activity

Section: Scheduling an Event

Enrolling an Employee

Purpose
- This section guides you through the steps to set up and enter student enrollments for Events using status to track enrollments, to enter multiple enrollments, and to make mass updates.

- Enrolling an employee is the action that follows Scheduling an Event.

Before You Begin
- You should access the **Search for Event** Window on the **Navigation List** through *Enrollments.* Although you can access **Event Search** through *Events,* the remaining windows will not display.

- If you have accessed the **Search for Event** and **Enrollment Summary** Windows to locate an Event and review enrollments, you can later go directly to the **Enrollment Details** Window. Exit the first two windows without doing a query, open the **Enrollment Details** Window and with your cursor in the *Event Title* data field, click the LOV. Select the Event you need.

- If you have more requested enrollments than available quotas, you need to decide which enrollments to place and which to put on a waiting list in case of cancellations. To help you decide which enrollments to place, you can enter a priority level against each enrollment.

- The **<History>** Taskflow button on the **Enrollment Details** Window displays the Events the employee is scheduled for or has completed.

- Booking priorities for civilian training are those defined by DoD and include:
  - Critical/Mandated
  - Essential
  - Recommended

- You can enroll students into events in advance or retrospectively by changing the enrollment date(s) in the Scheduled Events window.

♦ **Example:** If you have a scheduled event running from 05 to 08 January 2001, with enrollment dates from 01 December 2000 to 31 December 2000 and you want to enroll a student today (10 July 2000), change the enrollment start date to 10 July 2000.

Note: You cannot change the enrollment date in the **Enrollments Details** Window. The enrollment start date must be changed on the **Scheduled Event** Window.
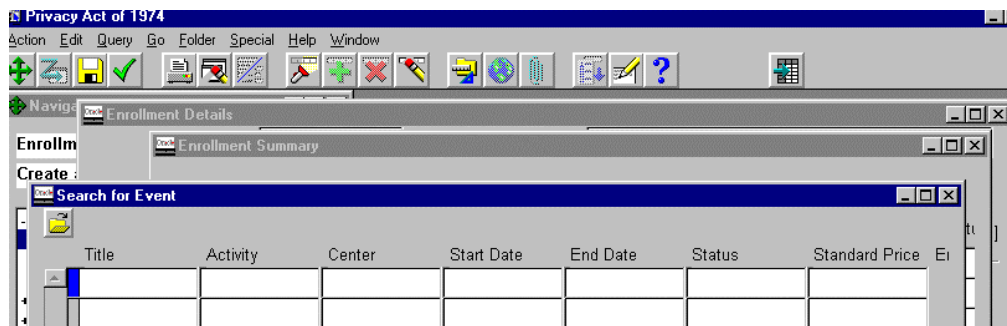
Enrolling an Employee, Continued

Cascading OTA Windows
- When you make a selection from the **Navigation List**, all windows needed for a procedure display in cascaded order on your screen. Start with the top window and when you finish each window, exit to the next window.

- If you work from the top window and exit each time, all windows needed for the action are in sequential order.
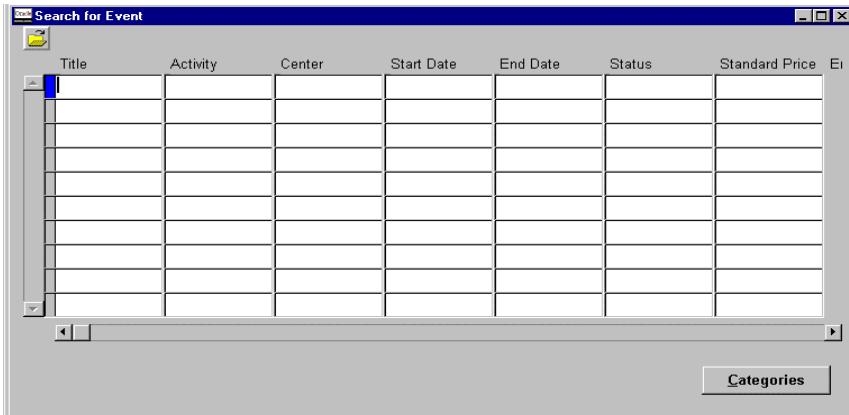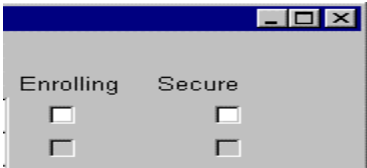
◆ Example:

Enrolling an Employee, Continued

Searching for an Event Window

Step	Action
1	From the **Navigation List** → *Enrollments*→ *Student*→ **<Open>**.
2	The **Search for Event** Window displays with seven columns and two checkboxes. ♦ **Example:** Use the bottom scroll bar to review the checkboxes.
	 | **Data Fields and Boxes**	**Description** | |---|---| | **Title** | A system-generated number or name you have assigned. | | **Activity** | Populated from the catalog. | | **Center** | Sponsoring location. | | **Start Date** | Self-explanatory. | | **End Date** | Self-explanatory. |

Enrolling an Employee, Continued
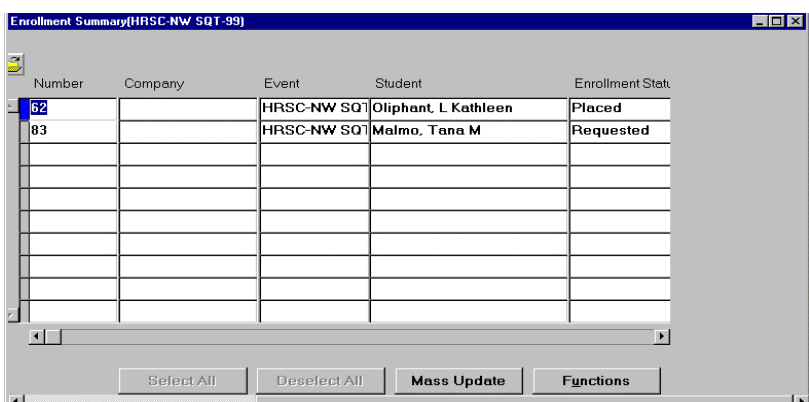
Event Window (continued)

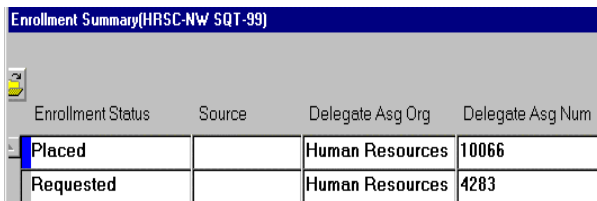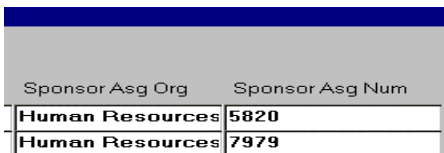| Step	Action
2 (cont)	<table><tr><th>Data Fields and Boxes</th><th>Description</th></tr><tr><td>**Status**</td><td>Normal, Completed.</td></tr><tr><td>**Standard Price**</td><td>Cost per student enrollee.</td></tr><tr><td>**Enrolling Checkbox**</td><td>If selected, enrollment is open.</td></tr><tr><td>**Secure Checkbox**</td><td>If selected, enrollment is limited to the organization sponsoring it.</td></tr></table>
3	Query the **Search for Event** Window for the Event you need, place the Record Indicator on the Event Title, and exit the window. **Note:** The Enrolling Checkbox will tell you if the Event is still open for enrollment.

Using the Enrollment Summary

Step	Action
1	The **Enrollment Summary** Window displays the Event, any students enrolled, and their Enrollment status: **Enrollment Summary(HRSC-NW SQT-99)** Number / Company / Event / Student / Enrollment Status 62 / / HRSC-NW SQT / Oliphant, L Kathleen / Placed 83 / / HRSC-NW SQT / Malmo, Tana M / Requested Select All / Deselect All / Mass Update / Functions

Enrolling an Employee, Continued

Using the Enrollment Summary (continued)

Step	Action
1 (cont)	Use the bottom scroll bar to review remaining columns:

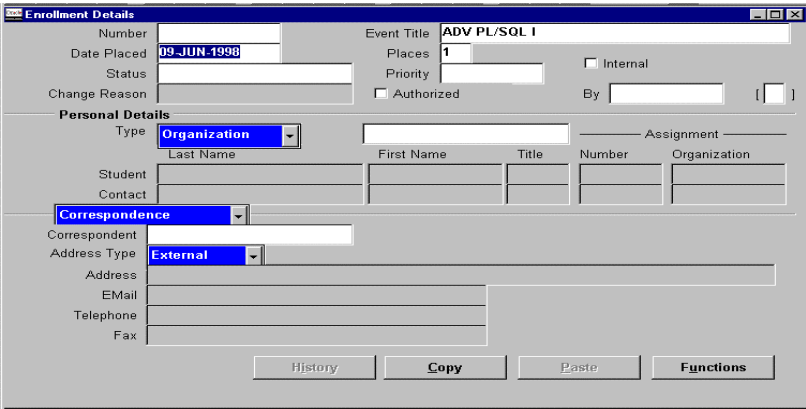| Data Fields and Buttons	Description/Action
Number	System Generated.
Company	
Event	The one you selected.
Student	Self-explanatory.
Enrollment Status	Placed and Requested.
Source	
Delegate Asg Org	Organization the student is assigned too.
Delegate Asg Num	System-generated.
Sponsor Asg Num	Organization sponsoring the Event.
Select All Button	Grayed out, used in mass updating.
Deselect All Button	Grayed out, used in mass updating.

Enrolling an Employee, Continued

Using the Enrollment Summary (continued)

Step	Action
1 (cont)	<table><tr><th>Data Fields and Buttons</th><th>Description/Action</th></tr><tr><td>**Mass Update Button**</td><td>Used to update more than one nomination.</td></tr><tr><td>**Functions Button**</td><td>Use to toggle to other windows; i.e. click on *Event Search* to return to that window or click *New Enrollment* to go to a blank window.</td></tr></table>
2	Exit the window. The **Enrollment Details** Window displays.

Completing the Enrollment Details Window

Step	Action
1	With the cursor in the *Number* data field, complete the following:

Enrolling an Employee, Continued

Completing the Enrollment Details Window (continued)

Step	Action
1 (cont)	

Data Field	Description/Action
Number	System generated. Displays after you re-open the window after saving.
Event Title	Auto-populates from Event.
Date Placed	Auto-populates from Event.
Places	Defaults to 1 but you can override.
Internal Checkbox	Not used by DoD.
Status	Click the LOV.
Priority	Click the LOV.
Change Reason	Grayed out; opens when Status is changed.
Authorized Checkbox	Select the checkbox.
By	Auto-populates with name of authorizing person.

Step	Action
2	Click the Descriptive Flexfield [ ] to display the **Additional Delegate Booking Information** Window.

Enrolling an Employee, Continued

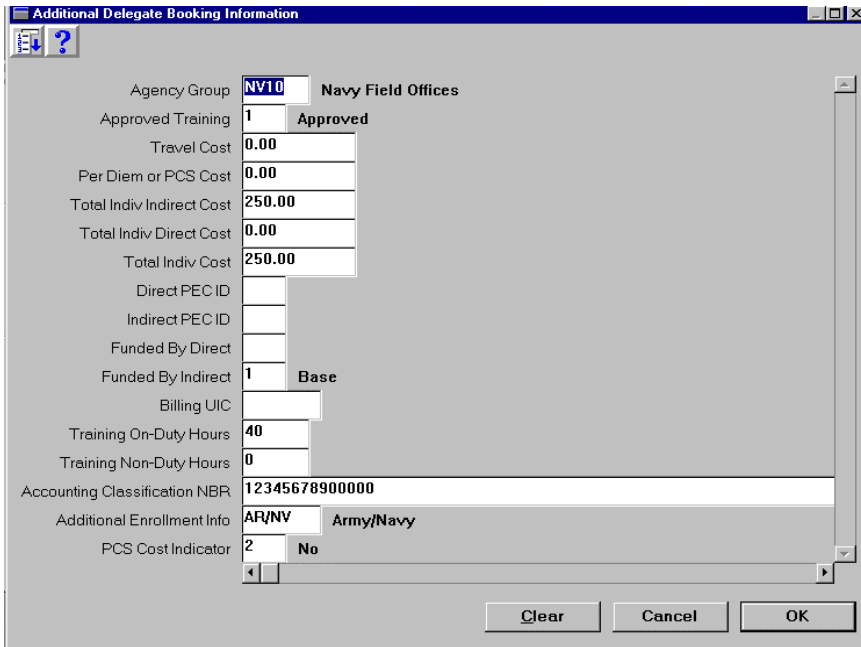**Completing Additional Delegate**
Booking Information

Step	Action
1	On the **Additional Delegate Booking Information** Window enter data as indicated:

Data Field	Description/Action
Agency Group	Click the LOV to populate agency where the employee works.
Approved Training	Click the LOV.
Travel Cost	Type in the dollar amount.
Per Diem or PCS Cost	Type in the dollar amount.
Total Indiv Indirect Cost	Populates from Event.
Total Indiv Direct Cost	Populates from Event.
Total Indiv Cost	Populates from Event.
Direct PEC ID	AF use.
Indirect PEC ID	AF use.
Funded by Direct	Click the LOV (AF only).
Funded by Indirect	Click the LOV (AF only).
Billing UIC	NV and AR use.
Training On-Duty Hours	Type in number of hours.
Training Non-Duty Hours	Type in number of hours.
Accounting Classification NBR	Type in free form up to 120 characters. This may also be used for Purchase card information.
Additional Enrollment Info	Click the LOV. (AF/NV use only)
PCS Cost Indicator	Click the LOV.

Enrolling an Employee, Continued

Completing Additional Delegate Booking Information (continued)

Step	Action
2	Click **<OK>**. ◆ Example of a completed window: ![Additional Delegate Booking Information window] Additional Delegate Booking Information Agency Group NV10 Navy Field Offices Approved Training 1 Approved Travel Cost 0.00 Per Diem or PCS Cost 0.00 Total Indiv Indirect Cost 250.00 Total Indiv Direct Cost 0.00 Total Indiv Cost 250.00 Direct PEC ID Indirect PEC ID Funded By Direct Funded By Indirect 1 Base Billing UIC Training On-Duty Hours 40 Training Non-Duty Hours 0 Accounting Classification NBR 12345678900000 Additional Enrollment Info AR/NV Army/Navy PCS Cost Indicator 2 No Clear Cancel OK
3	The **Enrollment Details** Window displays with the top region completed.

Enrolling an Employee, Continued
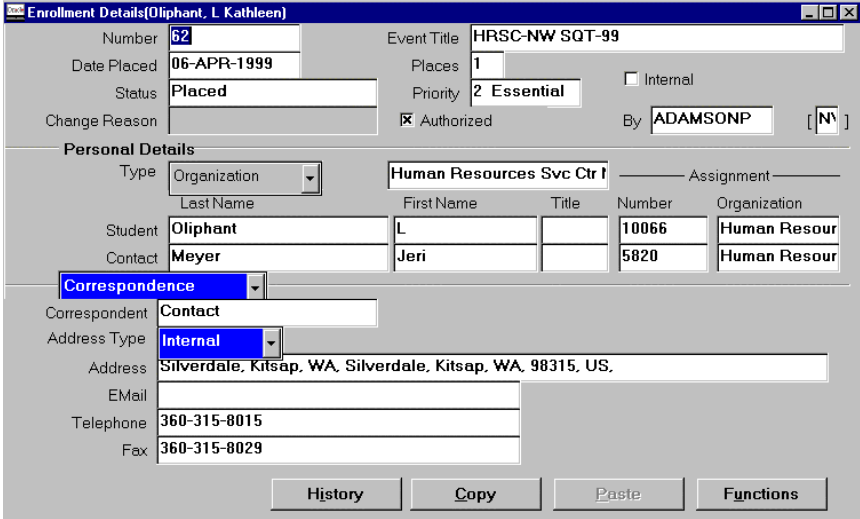
Continuing the Enrollment Details Window

Step	Action
1	On the **Enrollment Details** Window, complete the data fields for the **Personal Details** Region:

Data Fields and Taskflow Buttons	Description/Action
Type	Click the drop-down menu and select Organization. **Note:** The other choice is *Customer* (reserved for contract or military personnel).
Organization Assignment	Click the LOV. This narrows the search for names.
Student	Click the LOV to select the name; remaining fields populate with organization assignment.
Contact	Click the LOV to select the name, remaining fields populate. Required field. **Note:** Must be a supervisor, Training Monitor, or person with a Civilian Inbox. The Course Evaluation can then be forwarded to one of these inboxes in lieu of email when they have no access to the modern DCPDS.
Correspondence	Click the drop-down menu; select Correspondence.
Correspondent	Click the LOV.
Address Type	Click "External" for home address or "Internal" for work address. The remaining portion populates when the organization is selected and will be used for student notifications.
Email	Type in address.
Telephone	Type in number.
Fax	Type in number.
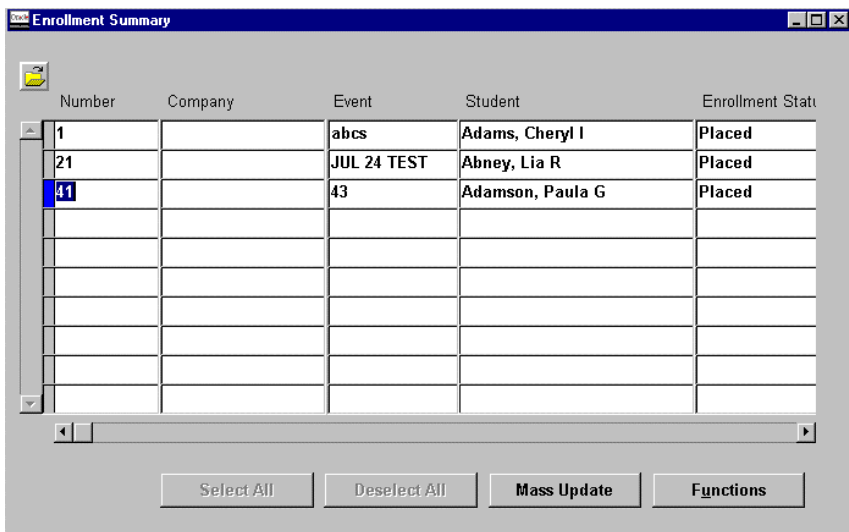
Enrolling an Employee, Continued

Continuing the Enrollment Details Window (continued)

Step	Action
1 (cont)	

Data Fields and Taskflow Buttons	Description/Action
<History>	Displays the **Student Enrollment History** Window of pending or completed Events.
<Copy>	Under development.
<Paste>	Grayed out.
<Functions>	Not used by DoD.

Step	Action
2	Click Save. The student's name appears on the window title. ♦ **Example:**
3	Exit the window. Your employee is enrolled.

Verifying Enrollments
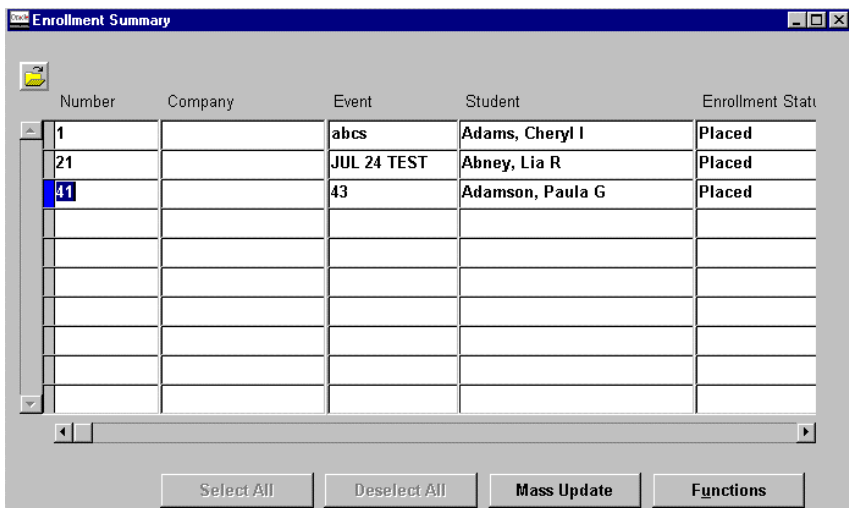
**Verifying
Enrollments**

Step	Action
1	On the **Navigation List** → *Enrollments* → *Student* **<Open>**.
2	The **Search for Event** Window displays. Query for the event. With the *Current Record Indicator* on the Event you need, exit the window.
3	The **Enrollment Summary** Window displays with the names of the Students Enrollment Status, etc. Once you have verified the information as correct, close the window and return to the **Navigation List**.

Entering Multiple Enrollments

**Entering
Multiple
Enrollments**
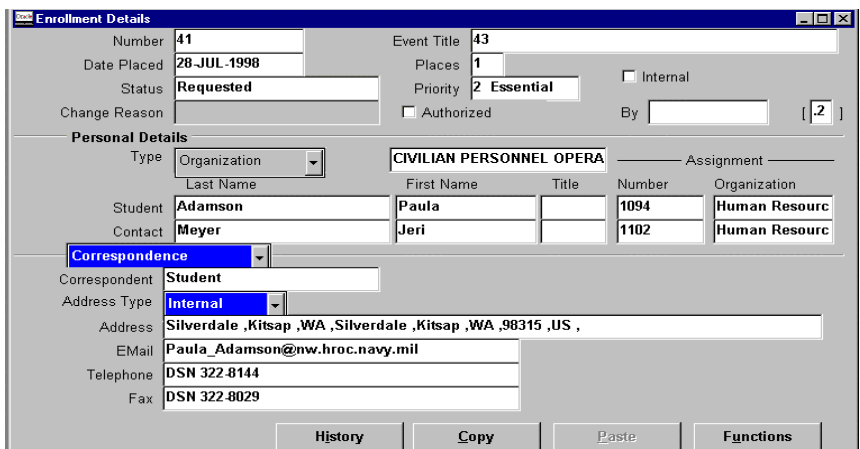
If you are updating several enrollments with the same data item, such as changing their status, or rolling them forward onto a new Event, you can make mass updates in the **Enrollment Summary** Window.

Step	Action
1	On the **Navigation List** → *Enrollment* → *Student* → **<Open>**.
2	The **Search for Event** Window displays. Query for the Event. With the *Current Record Indicator* on the Event you need, exit the window.
3	The **Enrollment Summary** Window displays with the selected Event and Status of each student. If correct, exit the window. ◆ **Example:** **Note:** The system refresh puts student names in alpha order regardless of the Enrollment Status.

Entering Multiple Enrollments, Continued

Entering Multiple Enrollments (continued)

Step	Action
4	The **Enrollment Details** Window displays with the selected Event.
5	Click new record on Toolbar. A blank **Enrollment Details** Window displays.
6	With your cursor in each needed data field in the top region, press F3. This duplicates the previous entry. The DDF will not duplicate but must be completed separately.
7	Click the LOV to complete the **Personal Details and Correspondence** Regions.
8	Click Save. Repeat the action to enroll the next employee.

Mass Updating Enrollments

Before you Begin

- You can do a mass update of the priority request to the status Placed, and issue a standard confirmation letter. You can do a mass update of the remaining request to the status Waitlisted, and issue a standard waiting list letter.

- If a placed student cancels, you can choose the highest priority Waitlisted student to fill the vacancy. You can do a mass update of all Waitlisted students to roll them over to the next scheduled Event for the Activity.

Mass Updating Enrollments Decision Table

Use the priority levels you entered for the enrollment for mass updating. Use the following decision table to help with your levels.

If…	Then…
You previously entered more Enrollments than available quotas	• You can use the priority levels to decide which enrollments to place and which to put on a waiting list in case of cancellations. • You can do a mass update of the priority requests to the status Placed and issue a standard confirmation letter. • You can do a mass update of the remaining requests to the status Waitlisted and issue a standard waiting list letter.
A placed student cancels	• You can choose the highest priority waitlisted student to fill quota. • You can do a mass update of all waitlisted students to roll them over to the next scheduled Event for the activity.

Mass Updating Enrollments
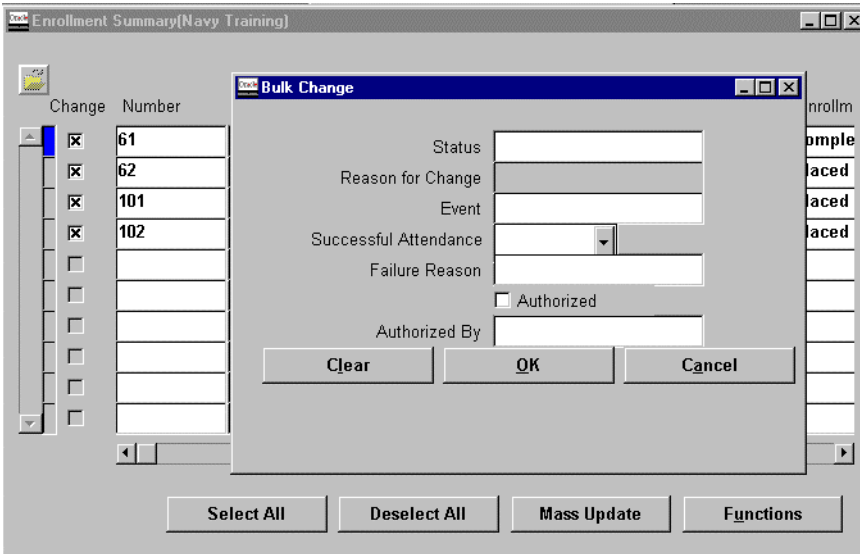
Step	Action
1	On the **Navigation List** → *Enrollment* → *Student* → **<Open>**.
2	The **Search for Event** Window displays. Query for the Event you wish to mass enroll. Exit the window.

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Mass Updating Enrollments, Continued
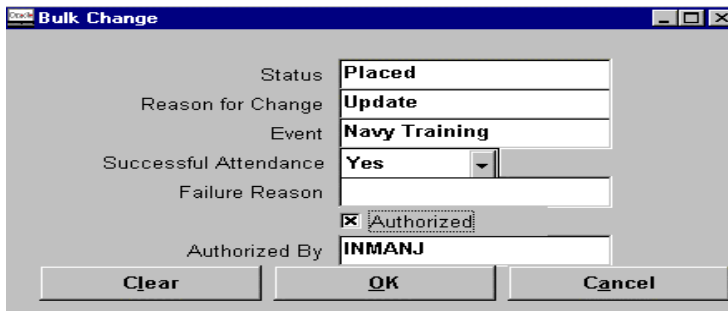
Mass Updating Enrollments (continued)

Step	Action
3	The **Enrollment Summary** Window displays. Click the correct Event and click <**Mass Update**>.
4	The **Bulk Change** Window displays with the **Enrollment Summary** Window behind it. Move the **Bulk Change** Window, if needed, in order to see the Taskflow buttons and **Change** checkbox simultaneously. Click <**Select All**>. Deselect the **Change** checkbox for specific enrollments you do not want to update or leave all enrollments checked if you want to update them all.
5	Click <**Deselect All**> if you do not want to update any enrollments for this Event.

Mass Updating Enrollments, Continued

Mass Updating Enrollments (continued)

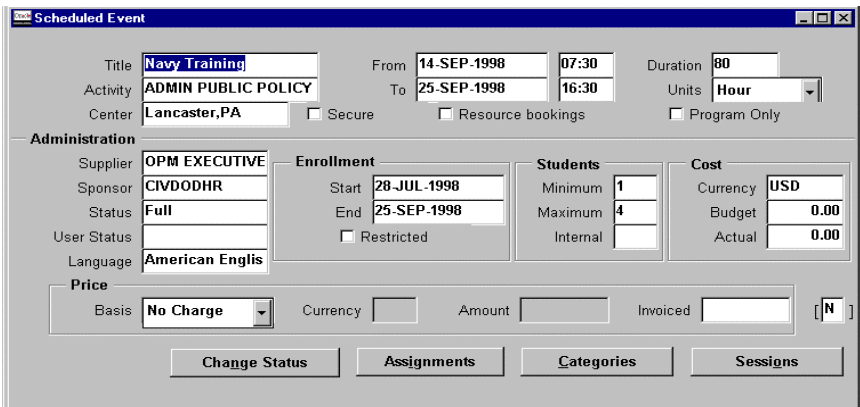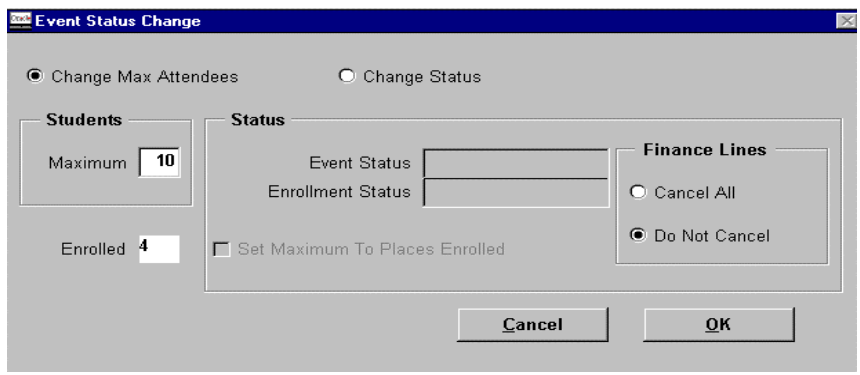| Step	Action
6	Select the new values you want to apply in the **Bulk Change** window. Enter a new Event if you want to roll forward the enrollments into a new Event.
	Complete the following data fields:

Note: OTA changes all the enrollment statuses en masse for you (and rolls the enrollments forward onto a new Event, if entered).

Data Fields	Description/Action
Status	Click the LOV and select new status.
Reason for Change	Click the LOV and select reason for change.
Event	Click the LOV to select the Event.
Successful Attendance	Click "Yes" or "No" from the drop-down menu. Not used by DoD.
Failure Reason	Click the LOV and select the reason.
Authorized Checkbox	Select the checkbox.
Authorized By	Auto-populates name of person.

Step	Action
7	Click **<OK>**. The **Enrollment Summary** Window displays.
8	Exit the window.

Changing Maximum Attendees
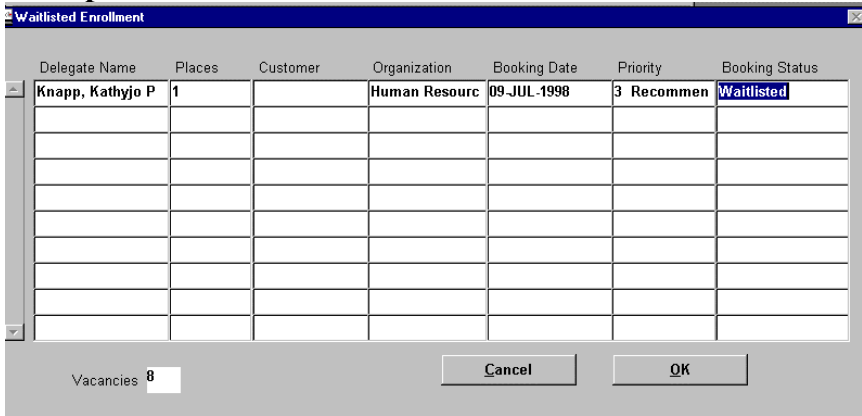
Changing Maximum Attendees

Step	Action
1	On the **Navigation List** → *Events* → *Scheduled* → **<Open>**. The **Scheduled Event** Window displays. Query for the Event. **Note**: If the **Secure** box is selected, you can only update the Event if you are assigned to the organization that is administering the Event.
2	Click <**Change Status>**. The **Event Status** Window displays.
3	Click the **Change Max Attendees** radio button and change the maximum number in the **Students** Region. The number currently enrolled displays in the box below it. Click **<OK>**. **Note:** You cannot reduce the maximum below the number currently enrolled with the Status *Placed* or *Attended* on the **Scheduled Event** Window.

Changing Maximum Attendees, continued

Changing Maximum Attendees (continued)

Step	Action
4	If the Event was previously Full and there is a waiting list, a pop-up box notifies you the "Waiting List Exists" and asks if you want to select a student from the waiting list.

Click <Yes> to select from the Waiting List	**Click <No> to save the new maximum numbers without selecting from the Waiting List**
• The **Waitlisted Enrollment** Window displays. (The number of vacancies for the Event appears in a box at the bottom of the window). • Select the student you want to enroll on the Event by positioning the cursor in the **Booking Status** field and selecting *Placed* from the LOV. (This enables you to fill the spaces before someone else enters new enrollments for the Event.) • Click <**OK**>.	• The **Event Status Change** Window displays. • The Event status returns to Normal and you and other users can fill the spaces as normal. • Click <**OK**>. • To check the changes you have made, re-query the Event and check to see if the Maximum Number field reflects the new number.

◆**Example:**

Waitlisted Enrollment						
Delegate Name	Places	Customer	Organization	Booking Date	Priority	Booking Status
Knapp, Kathyjo P	1		Human Resourc	09-JUL-1998	3 Recommen	Waitlisted

Vacancies 8   Cancel   OK

5	The Event status changes to "Full" when the maximum is reached.

Double-Booking an Enrollment

Double-Booking Enrollments

OTA prevents you from double-booking students with the following statuses into events:

- *Placed*
- *Attended*

A message box displays which indicates the employee is already enrolled:
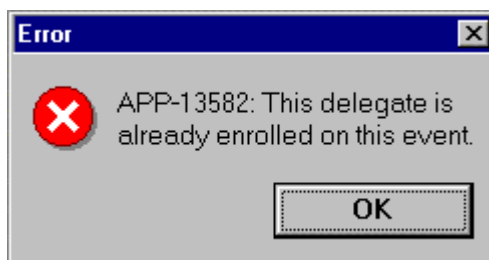
However, OTA does not prevent you double-booking students with the following statuses into events:

- *Requested*
- *Waitlisted*
- *Cancelled*

It assumes that until a student is Placed or has Attended an event, you can book them into another, clashing event. This provides you with some flexibilty in the way you define and manage booking students into events.

Note: OTA only checks for double-bookings when the status of the event is *Confirmed*. This enables you to double-book students while you are planning an event and, perhaps, testing various event date scenarios.

Canceling an Enrollment

Purpose	This procedure will guide you through the steps to cancel an enrollment.

See Also
👓
	Module 7, Employee Training and Development
	    Chapter 2, Administering Training
	        Sections: Defining an Activity
	                Scheduling an Event/Session

Who Does This	Components will determine who will have this responsibility.

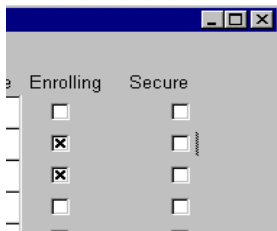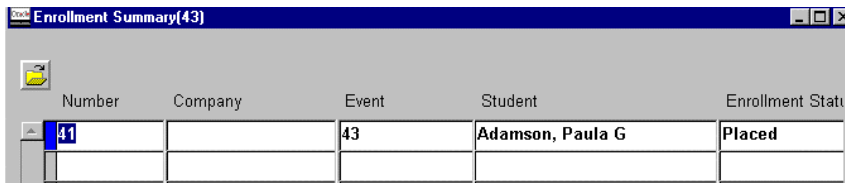|	
Before You Begin	• If the Event was previously *Full* and there is a waiting list, the system displays a pop up box notifying you the "waiting list exists" and asks if you want to select a student from the waiting list. • The system also advises you if the Event has reached or exceeded its maximum number of student enrollments. • When you cancel an Event, OTA automatically cancels all enrollments.

Canceling an Enrollment

Step	Action
1	On the **Navigation List** → *Enrollments* → *Student* → <**Open**>.
2	The **Search for Event** Window displays.

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Canceling an Enrollment, Continued
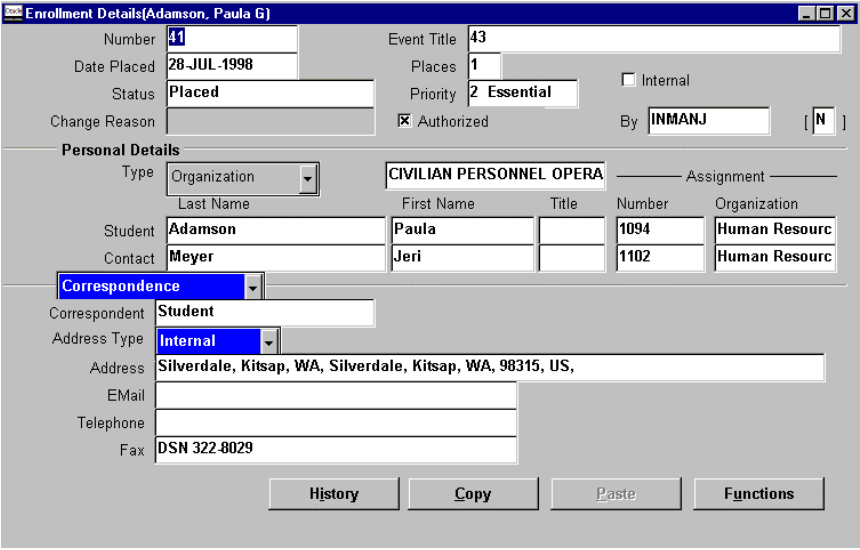
Canceling an Enrollment (Continued)

Step	Action
3	Query for the Event. Use the bottom scroll bar to review the remaining columns and checkboxes.
4	With the *Current Record Indicator* on the selected Event, exit the window.
5	The **Enrollment Summary** Window displays. Move the *Current Record Indicator* to the Event (student) you wish to cancel and exit the window.

Canceling an Enrollment, Continued

Canceling an Enrollment (Continued)

Step	Action
6	The **Enrollment Details** Window displays with the enrollee's name next to the window name. Click the *Status* data field (which currently shows *Placed*) and click the LOV to select *Cancelled*. Click **<OK>**.
7	The *Status* data field changes to *Cancelled.* Click Save on the Toolbar. **Note:** If the Event was previously Full and there is a waiting list, a pop-up box notifies you the Waiting List Exists and asks if you want to select from it.

Canceling an Event

Purpose	This procedure will guide you through the steps to cancel an Event.

See Also 👓	Module 7, Employee Training and Development 　　Chapter 2, Administering Training 　　　　Sections: Defining an Activity 　　　　　　　　Scheduling an Event/Session 　　Chapter 7, Setting Up Local Codes

Who Does This	Components will determine who will be given this responsibility.

Before You Begin	When you cancel an Event, OTA automatically cancels all enrollments. You can choose which cancellation status to use for the enrollments (if you define more than one in your Component).

Canceling an Event

Step	Action
1	On the **Navigation List** → *Event* → *Scheduled* → **<Open>**. The **Scheduled Event** Window displays.
2	With your cursor in the *Activity* data field, query the **Scheduled Event** Window. Once the query is complete, the message bar at the bottom indicates the number of records. Use the Page Down Key or the down arrow key to locate the one you want to cancel.

Canceling an Event, Continued

Canceling an Event

Step	Action
3	Click **<Change Status>**.
4	The **Event Status Change** Window displays. Ensure the **Change Status** radio button is on. With your cursor in the *Event Status* data field, click the LOV.
5	Click *Cancelled* and click **<OK>**. The *Event Status* data field populates with *Cancelled* on the **Event Status Change** Window.
6	With your cursor in the *Enrollment Status* data field on the **Event Status Change** Window, click the LOV. Select *Cancelled* and click **<OK>**.

Canceling an Event, Continued

Canceling an Event (continued)

Step	Action
7	The *Enrollment Status* data field populates with *Cancelled* in both status fields. Click **<OK>**.
8	A Caution Box displays and states, "All enrollments will be Cancelled." Click **<OK>**.
9	Exit the window.

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